Salesperson

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Overview

The Salesperson feature of SalesPad Cloud allows you to manage the sales associates in your company.

To get started, select **Salesperson** from the Settings menu.

Navigation Menu

Salesperson

Create a SalesPerson

To create a Salesperson, click the **New Salesperson** button in the upper left-hand corner of the screen.

The Salesperson drawer will appear. Fill out the information fields in this drawer.

For a brief explanation of the different information fields in the Salesperson drawer, click here:

Salesperson

Sales Person - Allows you to give a name to your Salesperson

Email - Displays the email address of your Salesperson

Initials - Allows you to assign initials for the Salesperson

Sales Territory - Assigns a Sales Territory to your Salesperson

Inactive - If checked, this Salesperson is inactive

When you've finished entering your information, click **Save**.

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Edit a SalesPerson

To edit an existing Salesperson, first select the Salesperson from the list on the left-hand side of the Salesperson window.

Once you've selected the Salesperson you want to edit, make your changes in the information fields on the right-hand side of the screen.

When you've finished making your changes, click **Save**.

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See it in Action

Salespersons dropdowns appear in various places in SalesPad Cloud, including in New or Edit Customer drawers.

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